VetraSpec

DATASPEC INC

Software as a Solution

Software Manual

VETRASPEC

Software Manual

Table of Contents

Welcome!

Ann Carrier and Tina Roff, partners of DataSpec, Inc would like to take this opportunity to welcome you in using VetraSpec—a complete VA claims management system!

We are proud to be an all-American owned and operated company.

VetraSpec was designed with the veterans advocate in mind. Our goal: design, develop and support a program that will meet the needs of the veterans advocate, now and in the future.

We, and our clients, feel VetraSpec is the best product on the market. The ease of use; secure, internet accessibility; and fully-functional program far surpasses that of the competition. Our on-line Knowledge Base and outstanding telephone support makes this program an excellent choice for any veteran advocate.

We know the importance of the work you do and we hope to become your partner by assisting you in serving our nations veterans through the VA benefits process. Thank you for your interest.

Ann & Tina

Product Features

VetraSpec is a web-based, Veteran claims management solution built for the veteran's service officer at any level. We offer two solutions; County and State Department. Both solutions offer everything listed below unless otherwise noted.

VetraSpec allows veteran service officers to access their data from any computer with Internet access. No more exporting and importing records across machines - all data is stored in one, centralized, secure location.

VetraSpec will save you countless hours and provide you with accurate data and forms. The program features:

- Claims management
    - Veteran and Dependent Data
    - Pending Issues
    - Current Claims
    - Records Request
    - Ancillary Benefits
    - Burial Information
    - Financial Assistance
    - Payments
- Data Tracking
- Recovery Tracking
- Encrypted e-mail
- Integrated Resources
    - Searchable 38CFR (Parts 3 & 4)
    - M21-1MR
    - Court Citations
- Combined ratings (with bilateral factor).
- Form Generation
- Electronic signatures (Optional. Signature pad purchased separately)
- Scanned Documents
- Extensive Report Generator
- Spell Check
- Financial Assistance
- Package This Claim Feature*
- Communication
- Scheduling
    - Individual calendar
    - Office calendar
    - Scheduling
- Searchable knowledgebase
- Courteous, friendly, prompt technical support

    - *Denotes State Department Feature

Search/Home

When you log into the program the default screen is the Home screen. The Home screen has the search function on it. You can also access the Search feature by clicking the tab at the top of page when in a veteran's record. You may search in different ways. Examples:

- Last Name
- First Name
- Social Security Number
- VA Claim Number

You may enter all or part of any of the above to search.

The percentage sign serves as a wild card.

Search examples:

- Enter "A" (without quotes) into the Last name field to see all veteran's whose last name begins with the letter "A".

- Enter "%ski" (without quotes) to see all veterans whose last name *has* "ski" anywhere in the name.

- Enter "373%" (without quotes) into the Social Security field, and see all veteran's whose SSN *begins* with "373".

- Enter "%1234" (without quotes) into the Social Security field and see all veteran's whose SSN *ends* with "1234".

Add a Veteran

Once logged into VetraSpec, you are taken to the Home screen. From this screen you can choose to search for a veteran who has previously been added to the database or you can add a veteran that is not currently already in the database.

To add a veteran, click the "Add" tab at the top left side of the screen.

(*NOTE:* if you are using the State Department solution, your screen may look slightly different)
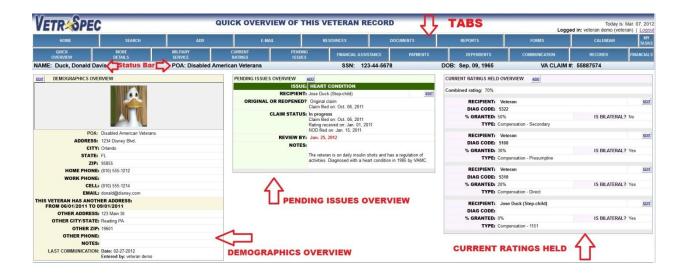
Fill out as much information as available and click the Submit button at the bottom of the page. The veteran is not added until the Submit button is clicked and you are taken into the veteran's record. Social Security and Last Name are required fields. *You must supply both to add a veteran.*

Also, if the Social Security number is already entered into the system, an error will pop up on the screen when you click the Submit button at the bottom of the page telling you that veteran already exists in the system.

The system is based on the veteran. So, if a dependent is the one seeking benefits, add the veteran first then proceed to add the dependent under the Dependents tab. Do not make the dependent as main record.

Quick Overview

The Quick Overview Screen is the first screen you are taken to when you go into a veteran's record. This is provided as a snapshot to give quick access to some basic information. This screen provides minimal information in several areas:

1. Demographic Information
2. Pending Issues Overview
3. Current Ratings Held Overview
4. Status Bar
   a. Veterans Name whose record you are currently in
   b. Power of Attorney
   c. Social Security Number of the veteran's record you are currently in
   d. Date of Birth of the veteran
   e. VA Claim Number

In addition to the snapshot view, you now have tab choices. To view more in-depth information about this veteran, click on the appropriate tab.

More Details

Y ou will find Veteran Details, Death & Burial and Claimant information on this screen. Below we will discuss the three sections in more detail.

Veteran Details

Certain standard information is shown in the Veterans Details section along with any information that has been previously submitted. To edit the Veterans Details page, click the "edit" button on the right side of the More Details page. Social Security number and Last Name are required fields.

On this page, you will have the option to insert a photo of the veteran; add demographic information; mark the veteran as deceased; manage your office location (if you have more than one office); and assign the record to a service officer (if you have more than one service officer in your office).

Death & Burial Information

This section is designed to track information related to the veteran's death. Several reports are generated off of the information you enter in this section i.e.: cause of death, list of veterans by cemetery….

> *If it will be important later, enter it now. You can't report later on information that you don't enter now!*
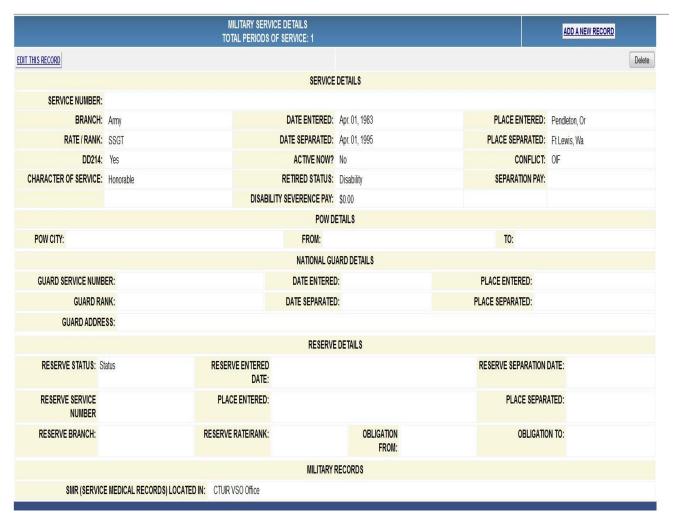
Claimant

If the claimant is someone other than the veteran, you can track this information here. Entering claimants here will push that information into applicable forms where needed.

Military Service

To add service information, go into a veteran's record and click the Military Service tab. Each period of service receives a separate record. You can add as many periods of military service as necessary. Each period of service allows you to add up to four sections:

- Service Details
- POW Details
- National Guard Details
- Where Military Records are Located

MILITARY SERVICE DETAILS TOTAL PERIODS OF SERVICE: 1		ADD A NEW RECORD
EDIT THIS RECORD		Delete

SERVICE DETAILS

SERVICE NUMBER:					
BRANCH:	Army	DATE ENTERED:	Apr. 01, 1983	PLACE ENTERED:	Pendleton, Or
RATE / RANK:	SSGT	DATE SEPARATED:	Apr. 01, 1995	PLACE SEPARATED:	Ft Lewis, Wa
DD214:	Yes	ACTIVE NOW?	No	CONFLICT:	OIF
CHARACTER OF SERVICE:	Honorable	RETIRED STATUS:	Disability	SEPARATION PAY:	
		DISABILITY SEVERENCE PAY:	$0.00		

POW DETAILS

POW CITY:		FROM:	TO:

NATIONAL GUARD DETAILS

GUARD SERVICE NUMBER:		DATE ENTERED:	PLACE ENTERED:
GUARD RANK:		DATE SEPARATED:	PLACE SEPARATED:
GUARD ADDRESS:			

RESERVE DETAILS

RESERVE STATUS:	Status	RESERVE ENTERED DATE:	RESERVE SEPARATION DATE:
RESERVE SERVICE NUMBER		PLACE ENTERED:	PLACE SEPARATED:
RESERVE BRANCH:		RESERVE RATE/RANK:	OBLIGATION FROM:	OBLIGATION TO:

MILITARY RECORDS

SMR (SERVICE MEDICAL RECORDS) LOCATED IN:	CTUIR VSO Office

Current Ratings

This tab allows you to input and track ratings the veteran has received from the VA. Current ratings that have already been inputted are listed at the top of the page. Ratings that have been closed out are grayed out and at the bottom of the list.

To enter a new award it is recommended you draw the information from a reliable source (i.e.: VA Rating Decision, VA computer system…).

> *Tip:*
> The benefit type you choose here (compensation, pension, education…), is tied to the Payments screen for adding payments later!

- Begin by going into a veteran's record and clicking on the "add a new rating" button under the Current Ratings tab. You will be prompted to choose the number of ratings you would like to add. This is a time saver if you just received a rating decision for multiple conditions.
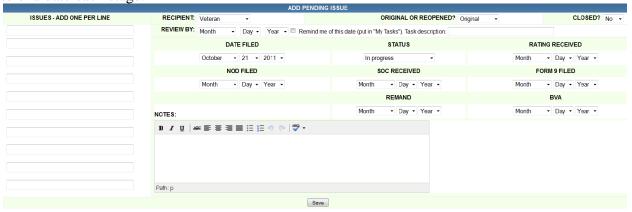- You will need to choose the recipient. Veteran is always listed in the dropdown menu. If the award is for someone other than the veteran, that person must first be added to the Dependents tab. If the person for whom you're entering a rating is not listed, that means you didn't add them as a dependent.
- Next, type the percentage granted. For pension, education… those benefits that do not have a percentage assigned, leave this field blank.
- Choose the type of benefit that was awarded from the dropdown menu. *Correct depiction of the award is import for accurate reports at a later date.*
- If you know the Diagnostic Code for compensation claims, enter the four digit number. If you do not know the code, you can choose to leave this area blank or click the link to "Look Up New Code". There are two boxes for diagnostic code in case the VA has utilized a hyphenated code.
- Check the bilateral box if the condition is determined by the VA to be bilateral. This will assist in the proper combination of the award percentage.
- Type the effective date of the award (not the day of the rating decision but rather the day the VA granted the benefit from).
- If the award is current, skip the "Date Stopped" date.
  - If the award has stopped for some reason (i.e.: veteran passes away, veteran receives an increase in the award, VA stops the award…), type in the date the award stopped. Once the award is saved, the award will be grayed out and moved to the bottom of your Current Ratings tab to allow you to see at one point the veteran held this award but it was stopped.
- Future Exams can be tracked with a date field inserted.
- There is an additional notes field. We encourage you to fill out important data about the award in this spot to reference later!
- Click the "Add" button once finished and your new ratings are saved.
- You can also Edit and Delete an award by clicking the respective buttons.

Pending Issues

This tab is used to track issues that are/were pending. This will allow you to effectively manage each individual claim the veteran has sought. Every issue/claim will receive it's separate record (i.e.: if the veteran is filing for 5 conditions each condition will be tracked separately). The reason is that the VA sometimes decides on 3 of the 5 issues, the fourth issue is deferred and they forget the fifth issue. Effective claims management will allow you to track each individual claim to evaluate each stage.

- Add your issues (we allow you to add more than one issue as a time saver as long as the dates are the same—if not, please add each issue seperately).

- Choose your recipient. Please note, the veteran will always be listed. If you do not see the recipient you are trying to select, you must first add them as a dependent.

- Choose if this is an original or a reopened claim.

- If you would like to set up a reminder task, please enter the date you would like to be reminded of this and a task description if needed.

- Fill out the date the claim was filed.

- Your status choices are:
  - In progress—choose this option if the claim has been, or is being, filed.
  - Favorable—choose this option if the claim has been decided and granted. Be sure to also mark the box above as "yes" for closed. This will gray out the issue on the main Pending Issues tab and place the issue to the bottom of the page allowing you to see you had filed for this condition previously.
  - Non-Favorable—this option is selected if the claim has been decided and was not a favorable outcome or denied. If the issue is being appealed, **do not** close it out, rather proceed in putting in appeal dates. However, if it is not being appealed, be sure to mark the box above as "yes" for closed. This will gray out the issue on the main Pending Issues tab and place the issue to the bottom of the page allowing you to see you had filed for this condition previously.

Pending Issues (cont.)

- o Confirmed & Continued—select confirmed & continued if the issue has been decided on and the VA has confirmed & continued their original rating. If the issue is being appealed, **do not** close it out, rather proceed in putting in appeal dates. However, if it is not being appealed, be sure to also mark the box above as "yes" for closed. This will gray out the issue on the main Pending Issues tab and place the issue to the bottom of the page allowing you to see you had filed for this condition previously.
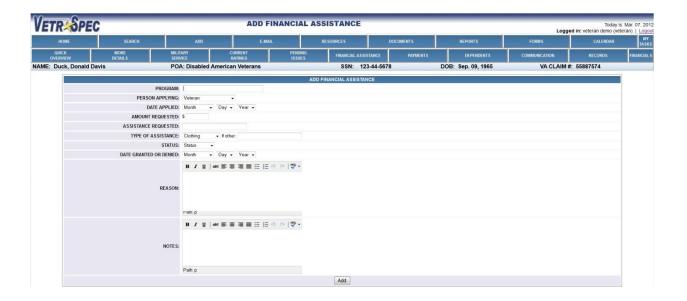
Great suggestions for the Notes field:
- *Additional information about this issue*
- *SSOC dates*
- *Status check information*
- *Brief reason for grant or denial*

- If a Rating Decision has been promulgated, type in the date of the rating. If the veteran agrees with the decision, close out the issue using the above instructions. If the veteran plans on appealing the decision, put in your dates but do not close out the issue.

- If you file an NOD or a VA Form 9 to appeal, you will need to manually put in the dates. Just filling out a form under the forms page does not automatically update this section.

- If a Statement of the Case, Remand or Board of Veterans Appeals decision is received, record the dates.

- Once a claim is closed out, you have the option to edit it or reopen it at a later date.

Financial Assistance

The Finacial Assistance tab allows for tracking of monatary assistance granted to the veteran/dependent. Not all individuals who use VetraSpec will use this tab. If your organization/state department/county… has a financial assistance program(s) that you wish to track, this is the tab to use.

It is imparitive to maintain the same format when typing in the Program (ie: choose one format and stick with it--County X Assistance Program, CXAP, Co X Asst Prog) If you utilize more than one way to refer to your program, your reports will not match up correctly.

Like other areas in VetraSpec, the veteran is always listed under recipient. Others are only listed if they have been previously added to the Dependents tab.

Payments

The Payments screen assist you to track recoveries. To begin a new payment,

- Once inside a veteran's record, click the Payments Tab.

- Click the "Add a Payment" button.

- Choose the Recipient (Like other areas in VetraSpec, the veteran is always listed under recipient. Other dependents are only listed if they have been previously added to the Dependents tab).

- Type the start date of the payment. This date is best derived from the VA award letter or the VA's payment screen.

- If the award has stopped, type in the date it stopped.

> **_Tip:_**
> If the Reference is Retroactive, there is no need to enter a stopped date. The stopped date will become the start date automatically.

- Choose the reference. This is an important step to ensure your reports will pull the correct numbers. This drop down menu is directly related to the Current Ratings tab. If you have not already entered a Current Rating, the only choice you will have is Retroactive and Other. It is best to enter the rating decision information under Current Ratings prior to establishing the payment.

- Type in the Amount. If it is a monthly award, type in the monthly amount. If it is a retroactive amount, choose the appropriate reference and put the total of the retroactive amount.

- Type any notes you feel necessary for this payment.

- Click the "Add" button to submit the payment.

- You can also choose to Edit the payment once you have added it. To do so, click the "Edit" button on the Payments screen.
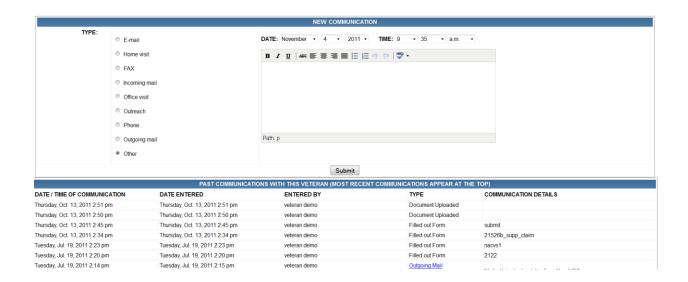
Dependents

The dependents tab provides an area to record and track the veterans' dependents. You must have the veteran already established in VetraSpec before adding dependents. To add a dependent:

- Go into a veteran's record and click the Dependents tab.
- Click the "add button".
- Enter known information.
- Choose the type of dependent
    - Not Related
    - Spouse
    - Deceased Spouse
    - Former Spouse
    - Child
    - Step Child
    - Adopted
    - Over 18 – in school
    - Child Previously Married
    - Helpless Child
- If this person is also a claimant, check the appropriate box and fill out address of the claimant if known.
- Click the "add" button.

If you are editing a dependent, go to the Dependents Tab, click "edit", make appropriate changes and click "update". To delete a dependent, go to the Dependents Tab and click the "delete" button next to the dependent you wish to remove.

Communication

The Communications Tab is a diary of events within the veteran's record. You can:

- Add new communication
- View when documents were uploaded
- View what forms were filled out
- View communications you have entered

In addition to that, the date and time of the communication, date it was entered, who it was entered by and the details of the communication are listed.

To add a new communication:
- Choose the Communication Tab
- Choose the type of communication (i.e. office visit, phone call, home visit…)
- If the date of the acutal communication is different from the current date and time listed, adjust as necessary. (We allow this option in case you actually had the communication a different day when not in the office. That is why you can view the date of the acutal communication and the date it was entered.)
- Type any additional note in the text box provided
- Click submit
- Once a communication is entered, you cannot edit or delete it. However, you can make another entry explaining an error or adjustment.

Records Request

This area is provided to keep track of records you have requested on behalf of a veteran. Some examples of records you might request are:

- National Personal Records Center records
- VA Medical Center records
- VA Regional Office records
- Service Department records
- Medals request

VetraSpec allows you to track when you requested the records to ensure you receive them. To add a new records request:

- Go into a veteran's record and click the Records tab
- Click "add"
- Fill out the following:
    - Type of record requested (i.e. service treatment records, C&P exam, medals…)
    - The day you requested the records
    - Who you requested the records from (see list of examples above)
    - Any additional information about the records you have requested
    - Click "add"

> **_Tip:_**
>
> _You can set up a reminder to check the status of the records request you have just established by going into the My Tasks tab._

Now that your records request is added, you can go back into view and make admendments to the request by clicking "edit". Once you have received the records, go back into the record request by editing and type the date the records were received.

Financials

The Financials Tab allows you to add financial information about the veteran and/or his/her dependents. This information will be brought into the appropriate forms as needed (10-10's, EVR's…) Like many aspects of VetraSpec, once the veteran is established, you will be able to add their financial information. However, you must add a dependent to the Dependents Tab before the dependent is listed in the Financials Tab. So, if you do not see the section to add financial information for a certain dependent in the Financials Tab, go to the Dependents Tab and add the dependent then go back into Financials.

INCOME, ASSETS AND EXPENSES							
VETERAN							
Veteran Assets	EDIT ASSETS	**Veteran Monthly Income**	EDIT INCOME	**Veteran Expenses**	ADD EXPENSES		EDIT EXPENSES
Cash, non-interest bearing bank accounts	$200	Social Security	$0	Type	Amount	Date	
Interest bearing bank accounts, certificates of deposit (CDs)	$0	U.S. Civil Service	$0	Rent	$950.00	Jul. 01, 2011	
IRA's, Keogh Plans, etc.	$0	U.S. Railroad Retirement	$0	Electric	$83.00	Jul. 11, 2011	
Stocks and bonds	$0	Military Retired Pay	$1200	Cable	$58.00	Jul. 15, 2011	
Mutual funds	$0	Black Lung Benefits	$0				
Value of business assets	$0	Supplemental Security (SSI)/Public Assistance	$0				
Real property (not your home)	$0	Other income received monthly	$0				
All other property	$2000	Gross wages and salary	$2250.00				
		Total interest and dividends	$0				
		Worker's compendation for injury	$0				
		Unemployment compensation	$0				
		Other military benefit	$0				
		Other one-time benefit	$0				
SPOUSE							
No assets at this time. - Add Assets		No income at this time. - Add Income		No expenses at this time. - Add Expenses			

As you can see in the picture above, there is financial information added for the veteran however, there is no financial information added for the spouse yet. To add information, click the "Add Assets/Income/Expenses" link for the appropriate person. To edit information previously entered, click the "Edit Assets/Income/Expenses" link. Make appropriate changes and click save.

Forms

VetraSpec houses 60+ of the most commonly used VA, DD and SF forms that a Veterans Servicer Officer uses. Forms cannot be adjusted from the original VA form (ie: if the VA allows for 3 lines for an address, we cannot "adjust" the form to make a 4th line). Forms are shown on the screen as the actual document. Once you are ready to print the form, it is transferred to a PDF for ease of printing and saving. Most forms in VetraSpec are editable after you have filled them out. All forms can be reprinted and deleted if necessary. In the Forms Tab on the right side of the screen, you will see forms that have previously been printed for this veteran as a history.

To open a form, click on the underlined link for the form number you wish to fill out. The information for your veteran that is already in the database will be pulled into the form. Fill out the remainder of the form, double checking the information that was drawn from the database. Upload a signature if applicable (see *Attaching a Signature*). You will have two choices:

- Save this form and complete it later
- Save this form and print it now

By choosing "Save this form and complete it later", you will be prompted to close the window that opened to fill out the form. Now, your form is saved for editing at a later date. You will see your form on the right side of the forms tab under Forms Printed for this Veteran. You may need to refresh your page for the form to appear in this area.

If you are having issues with your forms printing properly, please see Compatibility View under the Tips & Tricks section of this manual.

By choosing "Save this form and print it now", a new window will appear when a PDF is generated. From the PDF, choose to print your form. Once you are done printing, close the window that opened with the PDF.

Do not go into a form and delete all of the information to print a blank form. By doing this, you will delete that information in the veteran's record you are working in. Instead, if you need a blank form, we recommend you go to www.va.gov/forms to print blank forms.

Do not copy and paste from Microsoft Word. Word embeds code behind the scenes that will be pulled when you copy and paste causing your forms to display improperly. If you have composed in Word, copy & paste into Notepad (this will strip the behind-the-scenes code) then copy & paste from Notepad into VetraSpec.

Signature Pad

Click the icon to open up the SigTool Imager Plus software on your computer (see instructions below under Installing the Signature Pad for further direction).

Click the "Sign" button and have the veteran/claimant sign on the signature pad to capture the signature.

Next, click Create Image. The signature will now be an image file saved to your desktop (or wherever you choose to save it) named "sig<a bunch of numbers>.jpg".

To insert the signature into the completed form, click the "Browse" button by the signature section of the form in VetraSpec to locate the saved signature on your desktop (or wherever you choose to save it to).

The path will now appear in the signature box. Once you choose to Save the Form and Print it Now, the PDF will display the signature for printing.

Delete the signature from your desktop or wherever you choose to save it.

Repeat this for each form you are filling out for the veteran/claimant. Do not use the same signature more than one time.

Please note that the signature is saved in the form if you want to print it again. However, if you choose to edit the form at a later date, the signature is no longer saved and the veteran/claimant will need to resign the form.

Signature Pad Installation

To install the Signature Pad *purchased from DataSpec Inc*, **follow these instructions.**
To install the Signature Pad follow these instructions.

Do not plug the signature pad into your computer yet.

Download the software from Topaz using the link provided in the box or click here
http://www.sigpluspro.com/ . Choose the model for your signature pad (likely T-L460-HSB-R)

Click to install each of the 5 steps.

OPTIONAL STEP 3 - you can install plug-ins for Adobe and Microsoft Office if you want to use
the signature pad to sign documents created in those programs.

Follow the prompts. Be sure to pick the right model number when prompted.

Set Connection Type to HSB (USB type).

Click **"No"** when asked if a shortcut to the demo should be placed on the desktop.

Plug the pad into your computer.

NEXT: Download the SigTool Imager here:
http://www.topazsystems.com/Software/download/sigtoolimagerplus.htm

Click "Yes" when asked if a shortcut should be placed on the desktop.

Close all open setup windows.

To place a shortcut to the signature pad software in your quick launch bar (next to the start
button) by clicking and dragging the SigTool Imager Plus icon on your desktop down into the
quick launch toolbar.

**IMPORTANT - YOU MUST COMPLETE THE NEXT STEPS OR THE SIGNATURE
WILL NOT BE PROPERLY GENERATED.**

Configure the software:

Click the SigTool ImagerPlus shortcut that is now on your desktop.

Click the Settings button.

Set the following options:

Auto Save = On

Under file format: pick JPG
For image sizes: Width = 300. Height = 52

Click File Path

Choose Desktop

Enter sig.jpg and click Save.

When it's time for the vet to sign the pad, click the icon on your desktop, or in the quick launch bar, to open the SigTool Imager Plus" software. Click the "Sign" button and have the vet sign.

Click Create Image. The signature will now be an image file on your desktop named sig<a bunch of numbers>.jpg.
To insert the signature into the completed form, click the "Browse" button on the form and pick this file.

If you didn't get your signature pad from us, follow the manufacturer's instructions to install the pad, then set it to save the signature to your desktop and to capture the signature at 300 width (pixels) x 52 height (pixels).

Embedding a Signature

When it's time for the vet to sign the pad, click the icon on your desktop, or in the quick launch bar, to open the SigTool Imager Plus" software. Click the "Sign" button and have the vet sign.

Click Create Image. The signature will now be an image file on your desktop named sig<a bunch of numbers>.jpg.

To insert the signature into the completed form, click the "Browse" button on the form and pick this file.

Documents

Uploading your documents is a very easy process in VetraSpec! Our goal is to help your office become paperless!

By choosing the Documents tab located along the top of the page, you will see the documents that are already uploaded for your veteran. You can also upload a new document here.

Documents that are already uploaded show the document name, the type of file and the action. To view the document, click on the underlined link under the document name. To delete the document, click on the "delete" link under the action section. (***NOTE:*** *this permanently deletes the document and it cannot be recovered!*)

To upload a document, first it must be scanned using your office/desktop scanner, and/or saved as a file on your computer.

- Step 1, in VetraSpec, under the Documents tab, give your file a descriptive name.
- Step 2, Browse to Locate your Document. This is where you would have stored your document on your computer.
- Step 3, click the Upload button.

Please be patient as larger files will take longer to upload. There is a 6MB upload limit, per upload. If you find your file is larger than 6MB, please either zip the file (see below) or break it up into sections. Large volumns of service medical records may need to be broken into sections and zipped because of the size.
Please ensure that your scanner is set to **no more** than 200dpi and in **black and white** (not color/photo!). You do not need to scan at a high resolution, or in photo quality for documents. This will only make your file too large to upload!

Tip
You can upload any file format (including Microsoft Word, Excel, .jpg, .tiff….). No ".exe" or ".com" files allowed.

To zip a file or folder, right click on the file/folder and choose Send To "compressed zip folder". Then upload the compressed zip folder.
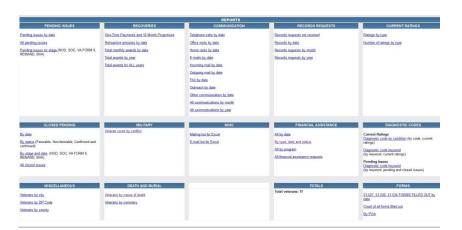
Reports

Reports are a vital tool for any veteran's service officer. We have tried to incorporate many useful reports within VetraSpec to assist you with your reporting needs.

To view the available reports, click on the Report Tab from any screen within VetraSpec. This will take you out of the veteran's record you were working in and into the Reports section.

The following reports are currently available in the County Solution of VetraSpec as of the date of this writing. State solution Report screens will differ depending on the reporting needs of your state. On occasion we will add new reports to this section.

- Pending issues by date
- All Pending issues
- Pending Issues by stage
- Closed pending issues by date
- Closed pending issues by stage and date
- All closed pending issues
- Veterans by city
- Veterans by zip code
- Veterans by county
- One-Time Payments and 12 month projections
- Retroactive amounts by date
- Total monthly awards by date
- Total awards by year
- Total awards for all years
- Veteran county by conflict
- Veterans by cause of death
- Veterans by cemetery
- Telephone calls by date
- Office visits by date
- Home visits by date
- E-mails by date
- Incoming mail by date
- Outgoing mail by date
- Fax by date
- Outreach by date
- Other communication by date
- All communications by month
- All communications by year
- Mailing list for Excel
- E-mail list for Excel
- Records request not received
- Records request by date

Reports (cont.)

- Records request by month
- Records request by year
- Financial assistance all by date
- Financial assistance by type, date and status
- Financial assistance all by program
- All financial assistance requests
- Current ratings by type
- Number of current ratings by type
- Current ratings Diagnostic code by condition
- Current ratings diagnostic code by keyword
- Pending issues diagnostic code by keyword
- Forms 21-526, 21-527, 21-534 filled out by date
- Count of all forms filled out
- Forms by POA

We offer customized forms! Contact us for a quote.

Once a report runs and you have results on the screen, you can highlight the information, right click, click copy, then paste into Microsoft Excel to manipulate the data; run additional reports; sort and filter; or make charts!

Calendar

The calendar function is an addition to VetraSpec to allow for scheduling for the user, office, groups and transportation van.

You must log into the calendar using the same login you used for VetraSpec. From there, you can:

- Add a new entry
- Import to the calendar
- Export from the calendar
- Search with the calendar
- View other calendars which you have access to
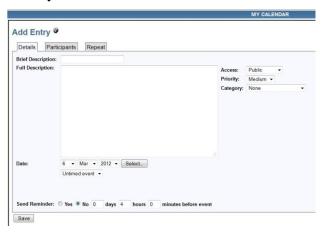
The Calendar function within VetraSpec is a great way to generate an office group calendar or a van scheduling calendar!

Once logged in, to add a new entry either click on the + button on the date or at the bottom of the screen, click the Add New Entry link. You will be redirected to the page that will allow you to add your information.

From this screen, you can give your entry a brief description that will show on the face of the calendar; a full description of the details of your event; choose who will see the event; select a priority and a category.

You are given the choice to adjust the date along with the time of the event. You can choose if the event is untimed, has a specific time (ie: 10:00am) or is an all day event. A notification can be set up to be sent to your email reminding you of the upcoming event. You can choose the number of days, hours and minutes prior to the event you wish to be notified.

Once saved, your new event will show on your Calendar.

Resources

Vetra Spec has integrated the following resources into it's program:

- Code of Federal Regulations
  - Part 3
  - Part 4
    - Subpart A
    - Subpart B
- M-21-1MR
- United States Court of Appeals for Veterans Claims Full Court Orders and Opinions

We update these annually to ensure the most up-to-date information. Each has a Search function to enable you to find what you are looking for more easily. You can copy and paste into forms directly from this section.

Enter search term(s) below to search the full text of the CFR (part 3, part 4, subpart A and subpart B)

[Search]

4 RESULTS FOR "SEVERANCE"   Search results for the word "severance"

Title	Chapter	Part	Subpart	Section Title	Section	Content
TITLE 38 PENSIONS, BONUSES, AND VETERANS' RELIEF	CHAPTER I DEPARTMENT OF VETERANS AFFAIRS	PART 3 ADJUDICATION	Subpart A Pension, Compensation, and Dependency and Indemnity Compensation Authority: 38 U.S.C. 501(a), unless otherwise noted.	General.	3.700	... **Severance** pay. Where the disability or disabilities found to be service-connected are the same as those upon which disability **severance** pay is granted, or where entitlement to disability compensation ... Read more
TITLE 38 PENSIONS, BONUSES, AND VETERANS' RELIEF	CHAPTER I DEPARTMENT OF VETERANS AFFAIRS	PART 3 ADJUDICATION	Subpart A Pension, Compensation, and Dependency and Indemnity Compensation Authority: 38 U.S.C. 501(a), unless otherwise noted.	General.	3.5	... **severance** of service connection. (s) Treasonable acts or subversive activities (38 U.S.C. 6104 and6105; Sec. Sec.3.902, 3.903). (1) Treasonable acts. Date of theforfeiture decision or date of ... Read more
TITLE 38 PENSIONS, BONUSES, AND VETERANS' RELIEF	CHAPTER I DEPARTMENT OF VETERANS AFFAIRS	PART 3 ADJUDICATION	Subpart A Pension, Compensation, and Dependency and Indemnity Compensation Authority: 38 U.S.C. 501(a), unless otherwise noted.	Revision of decisions.	3.105	... **Severance** of service connection. Subject to the limitationscontained in Sec. Sec.3.114 and 3.957, service connection will besevered only where evidence establishes that it is clearly andunmistakably e ... Read more
TITLE 38 PENSIONS, BONUSES, AND VETERANS' RELIEF	CHAPTER I DEPARTMENT OF VETERANS AFFAIRS	PART 3 ADJUDICATION	Subpart A Pension, Compensation, and Dependency and Indemnity Compensation Authority: 38 U.S.C. 501(a), unless otherwise noted.	General.	3.4	... **severance** of serviceconnection. (2) Disability compensation. Earliest date as of which it isfactually ascertainable that an increase in disability had occurred ifclaim is received within 1 year fr ... Read more

My Tasks

The My Tasks tab allows users to track responsibilities and be reminded of them. By clicking the My Tasks tab while within a veteran's record, you can set up a task associated with that Veteran. However, you can also set up a task not associated with a veteran's record. To do this, before you are in a veteran's record, click the My Tasks link from the Home Screen.

Another avenue to add a task for a veteran is under the Pending Issues tab. This allows you to set your task up while you are adding a pending issue.

Under the My Tasks tab, you can view the last 10 records that have been entered, or, by clicking the Show All link, you are able to view all tasks you have entered.

Also under the My Tasks tab, you can view the last 10 records that were completed. Again, you can click on the Show All link to view all completed tasks not only for this veteran but every task you have ever completed.

To add a new task:

- Click on the My Tasks tab either once you are in a veteran's record or from the Home screen if you are not setting up a task for a specific veteran
- Type the task you want to be reminded of
- Choose a review by date
- Click Add

Once a task is set up, each time you log into VetraSpec, you will see a listing of the upcoming tasks on the left side of the page.

To mark a task as completed:

- Click on the My Tasks tab
- Find the task you wish to mark as completed
- Click on the radio button Mark Completed

Email

VetraSpec has integrated, secure, email within the program. By clicking on the Email Tab, you will open up your email in a separate window.

You must log into the email separately using your VetraSpec login, followed by a dot, and your domain name (the first part of the Web address you use to get into VetraSpec).

Example: your VetraSpec domain name is: **pretendcounty.**vetraspec.com and your username is **acarrier**.

Your *e-mail* login would be: **acarrier.pretendcounty**. The password is the same as your VetraSpec password.

Once you are logged into your VetraSpec e-mail, expand the "Mail" submenu on the left navigation bar by clicking the plus (+) symbol next to **Mail**.

To send encrypted e-mail, you must first exchange digital signatures with the recipient. To do so, click on "New Message".

1. Type the e-mail address of the person you are writing to in the "To:" field.

2. Type your subject in the "Subject:" line, and write your message in the "Message Body" section.

3. Tell your recipient you are signing this message and that they need to:

  a) Add you to their contacts list from this message AND
  b) Send you back a signed message.

An example message would be (copy and paste into your message if you like):

Hello,

We need to exchange digital signatures to be able to send encrypted e-mail to each other. This message is signed.

Please add me to your contacts by right clicking my e-mail address in the "From" field at the top of this message and clicking "Add to Contacts" - this will save my signature in your address book. You must add me to your contacts right from this message, or the signature will not be saved.

Then reply to this message, and be sure to sign it before you send it.

Thank you.

At the bottom of the page, below the message body, be sure to select "**S/MIME Sign Message**" from the drop-down box.

When you are satisfied with your composition, and you have selected "**S/MIME Sign Message**" from the drop-down box, click on the "**Send Message**" button. A new window will open on your screen, prompting you to enter your passphrase. The security passphrase is the same as your VetraSpec password. Type it into the box, and then click the "**Submit**" button.

When you receive a reply from your recipient, open it and click the "Save in your Address Book" link in the yellow box above the message text.

You are now able to send and receive encrypted e-mail from that recipient. This process must be repeated for each person with which you want to exchange encrypted messages.

To encrypt further e-mails to your recipient, compose the message and select "**S/MIME Encrypt Message**" from the drop-down box below the message body. Click **"Send Message"** and enter your passphrase, if prompted.

Note: You will only be prompted for your passphrase one time per login.

You can use the built-in encrypted e-mail to send sensitive information back and forth to each other securely, or to communicate with other offices or the regional centers.

At this time, the VA regional centers can read encrypted e-mail from VetraSpec users, but they are unable to respond with encrypted messages. This is a technical issue on their end.

Adding a Photo

Adding a photo to a veteran's record within VetraSpec will enhance your ability to associate the veteran with the previous service you have provided. Either under the Add tab when you originally add a new veteran or under the More Details tab, you can add a photo for your veteran! Photos must be 5mb or less to upload.

- Within your veteran's record, click on the More Details tab
- Click the Edit button
- Click on the Browse button on the right side of the page
- Locate your picture file to be uploaded
- Click open. A link will be shown in the box on your VetraSpec page. Do nothing with the link.
- Click Save at the bottom of the More Details page
- Your file will now be uploaded and your picture will be associated with this veteran's record

Control Panel

The Control Panel is designed to allow you to make some small adjustments to the database yourself. Depending on the level of permission you are granted within VetraSpec, you may see all of the following:

- Change my account information
- Change office information
- Change user information
- Delete a veteran

To change your account information, click on the link provided in the Control Panel. From here you will be able to change your:

- Name
- Email address
- Title
- User name
- Password

NOTE: If an employee leaves your office, *do not* just change this person's information with a new hire. Contact us to add the new hire and suspend the old user. This section is used if you have a name change (ie, marriage, divorce…); have a new title; need to update your e-mail address or change your password. Do not tab past the password section. Doing so will clear out your password and prevent you from logging in.

To change the Office information (ie, office address, phone number, fax number…) within the Control panel, click the link to do so. Make your changes and click the submit button.

To change a users inforamtion (higher levels of permissions), click the Change User Information button in the Control Panel. From there, use the drop down menu to pick a user to edit. Click the Get User button. Make your changes within that user's account and click Update.

Higher levels of permission have the ability to delete a veteran who was accidently inserted into the database. **DELETING A VETERAN CANNOT BE UNDONE.** Ensure you want to delete the veteran before proceeding. Click on the Delete Veteran link within the Control Panel. Type in the last name of the veteran you wish to delete. A listing of veterans with that last name in the database are shown. Follow the on-screen instructions.

Package This Claim©

Overview

Package This Claim replaces the paper-based claims submission process between out-based offices and the state department.

Using a signature pad with VetraSpec, along with Package This Claim, can make the claims process paperless, instantaneous (no more postage!) and traceable.

Premise

All claims have a status.

1. Submitted – the claim has been submitted by the out-based office to the state department.
2. Received – the state department acknowledges they've received the claim.
3. Needs More Information – the state department says the claim is not complete and needs more information from the out-based office.
4. Filed – the claim has been printed and filed with the VA.
5. Rating Received – a rating decision has been received and entered into VetraSpec.
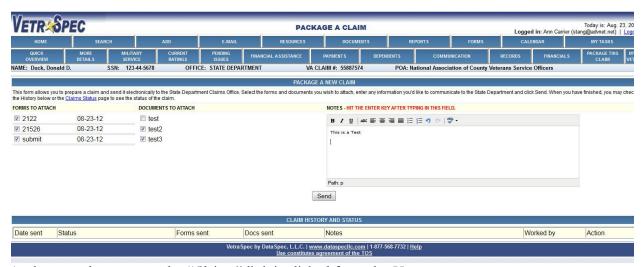
Flow

Out-based office > State Department

County/out-based office meets with the veteran and uses VetraSpec to fill out forms and upload documents.

When the claim is **complete**, Package This Claim is clicked.

The appropriate forms and documents are checked and any applicable notes are entered. The claim is submitted.
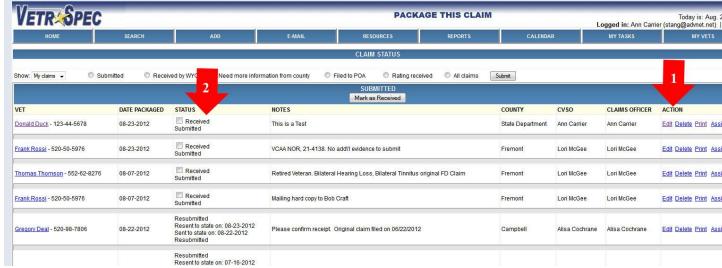
At the state department, the "Claims" link is clicked from the Home screen.

The drop down is set to "All Claims", and the option button "Submitted" is clicked.

The report is run. This shows all claims submitted by the out-based offices that are "Submitted" (ie, not marked as "Received", "Filed", "More Information Needed" or "Rating Received".

The state department can click "Edit", "Delete", "Print" or "Assign".

- Print – used to print/view the forms and documents for this claim. If the proper forms and documentation have been submitted, they are printed and the "Received" check box is clicked.

- Edit – if the proper documents or forms have not been included, Edit is clicked. Notes are entered that the state department wishes to communicate back to the out-based office and "Needs more information" is chosen from the drop down box.

- Assign – some of our customers "assign" claims to specific people in the claims office. Clicking "Assign" allows state department personnel to change the "Claim Managed By Field" within VetraSpec.

- Delete – deletes the claim. This is permanent and cannot be undone. Clicking Delete does NOT delete the forms or the documents – it only removes the "packaged claim" record.

Once the claim has been printed and filed with the VA, the state department will need to go back into the veteran's record and mark that claim as "Filed". This can be accomplished either via the Claims screen (from the Home screen), or by the Package This Claim link from within the veteran's

record.

Some of our customers have linked "Received" and "Filed" so that when a claim is marked as "Received" is also marked as "Filed" at the same time, thus saving this additional step. We can tailor this part of the process to suit your needs.

State department to out-based office

Once the state department has done their part with the claim, the out-based workers can click the "Claims" link from the home screen at any time and run the various reports to see the status of all the claims they've submitted. They can also see the claims' status from within the veteran's record by clicking "Package This Claim".

If the state department has marked the claim as "Needs more information", the out-based worker can "Edit" the claim, fix it and re-submit. Claims can be sent back and forth between the out-based offices and the state department three times.

Permissions

State department workers can see and do everything mentioned above.

Out-based/county workers can only see claims they've submitted, and those claims belonging to veterans assigned to their office.

They cannot see the "Received" checkbox.

They cannot mark a claim with a status (ie, "Received", "Needs more information", "Filed", or "Rating Received"). Only state department workers have access to these options.

On the Claims Status screen (Claims from the Home screen), out-based workers can "Edit", "Print" and "Delete" their own claims and those belonging to veterans assigned to their office.

Tracking

At any time, the state department can also run any of the Claims Status reports (Claims from the Home screen). This is useful when a quick look at all outstanding claims is needed.

Customizations

Each state department operates a little differently. The photos above might not match your VetraSpec screens exactly.

We can tailor the Package This Claim feature within your copy of VetraSpec to better match your exact processes.

Do's and Don't's

- Do delete temporary internet files frequently (weekly).
    - In Internet Explorer, click Tools/Internet Options.
    - Click the General tab
    - Click Delete under Browsing history.
    - Click Delete all
    - Click Yes to confirm that you want to delete this information, and then click OK.

- Do fill out as much information about your veteran under each tab!

- Do not go into a form and delete all of the information to print a blank form. By doing this, you will delete that information in the veteran's record you are working in. Instead, if you need a blank form, we recommend you go to www.va.gov/forms to print blank forms.

- Do not copy and paste from Microsoft Word. Word embeds coding behind the scenes that will be pulled when you copy and paste causing your document to display improperly. You can compose in Word, copy & paste into Notepad (this removes the behind the scenes coding) then copy & paste from Notepad into VetraSpec.

- Do not be in more than one veteran's record at a time or have multiple tabs open for the same or different veteran!

- Do not use invalid social security numbers like letters or all ones or zeros, as this will result in bad data in your database. Invalid social security numbers will cause inaccurate information in reports. REMEMBER: GIGO - garbage in = garbage out!

- Do not use the back button. Rather, click on the tabs as you need them.

Compatibility View & PDF Plug-in

IT IS VERY IMPORTANT YOU FOLLOW THESE INSTRUCTIONS

Enable Compatibility View for all websites in Internet Explorer

Enable Compatibility View for all websites. To do this, follow these steps:

1. Start Internet Explorer 8 or Internet Explorer 9.
2. On the **Tools** menu, click **Compatibility View Settings**. If the **Tools** menu is not displayed, press ALT to display the **Tools** menu.
3. If **Compatibility View Settings** is not available, the network administrator may have used a Group Policy setting to configure the options for you. Contact your administrator or the help desk. Click to select the **Display all websites in Compatibility View** check box, and then click **Close**.

AND

Disable IE plugin

Internet Explorer 7 and below instructions

In Internet Explorer, click Tools (it's at the top of the screen, to the right of File, Edit, View ...).
Under the General Tab, in the Browsing history section, click the "Delete" button.
In the Temporary Internet Files section at the top, click the "Delete Files" button.
This clears out your temporary internet files. If you've never done this it might take a few minutes. You should do this about once a week to keep your computer running well.

Next, click the Programs tab.
Click the button on the bottom "Manage Add ons". Click "Adobe PDF Reader", and click the "Disable" option button on the lower left. Click "Ok" then "Ok" again. Close and re-open Internet Explorer.

Internet Explorer 8 and above

Follow the instructions on this page to *disable* the PDF plugin:
http://helpx.adobe.com/acrobat/using/display-pdf-browser-acrobat-xi.html

If you have Adobe Acrobat Reader XI or above, STOP HERE, you're done.
If you have Adobe Acrobat Reader X or below, do this:
Open Adobe Acrobat Reader.
Click Edit then Preferences.
Click the "Internet" option on the left.
UNCHECK "Display in browser"

Tips & Tricks

- The "See all of my Veterans" link on the home page will only show you the veterans you have personally entered into the system under your user name. This will not show you every veteran in your database. To see all veterans in your database, type % in any of the search boxes on the Home screen.

- Use the "Communications" tab like a diary. You can enter all communications to and from each vet under this tab. The Communications are editable; the date and time the communication was *entered* is logged; the date and time the Communication was *received* can be changed if needed; and the user who entered the data is displayed. The system will automatically show any forms filled out for the veteran.

- VetraSpec is a "pending issue" based program. When a vet files a claim, he/she may have many issues for which they're trying to gain benefits. Use VetraSpec to track each of these issues individually. When a vet has a new pending issue, enter it under the "Pending Issues" tab. Enter each issue individually. When you get decisions back, go into that vet's record, click the "Pending Issues" tab and update the status (approved, denied, BVA, NOD ...) of that issue. If it is marked as approved, it will be placed into the History file, and you would add a new Current Rating at that point.

- Enter each period of military service separately.

- Under the More Details tab, at the bottom of the screen, you will find Death and Burial information. When a veteran passes, be sure to enter the cause(s) of death. This way, in the future, if the VA adds new conditions, you can easily search your database for vets who passed from that condition.

- Under the Financials tab you can enter Income, Assets and Expenses for vets and dependents. You must enter the dependents under the "Dependents" tab to be able to add financial information for that person. The information entered here will be automatically pulled into forms.

- Under the Pending Issues tab, you will see a "Remind me" checkbox. If you check this box, the Veteran's name will appear in red on the home screen 5 days before the date you set to remind you that issue needs to be reviewed.

- The system does not allow for duplicate social security numbers, and **social security numbers are a *required field*.**

Below is an example of a VetraSpec Work Flow that was prepared by a State Department. If you are a county user, some sections may not apply to you.

Vetraspec Work Flow